



Sonoma County: Building TouchPoints

Welcome!

KRYSTAL MONTGOMERY
TRAINING ASSOCIATE

kmontgomery@socialsolutions.com



Agenda

TOUCHPOINTS

CREATE TOUCHPOINTS

EDIT TOUCHPOINTS

MULTIPLE PARTICIPANT TOUCHPOINTS



Learning Objective

Prepare ETO Administrators to successfully manage and maintain TouchPoints. Administrators should leave the training with the basic understanding of creating and editing TouchPoints.

TouchPoints



TouchPoints

A form that captures data regarding services, demographics, and change.



TouchPoint Subjects

- Single & Multiple Participants
- Single & Multiple Entities
- Single & Multiple Families
- Collections
- General (Program Specific)
- Anonymous



What is a TouchPoint

Questionnaires that typically fit into one of the following categories:

- More detailed set of questions that are a continuation of demographics
- A form that includes weighted questions (on knowledge, attitude, behavior etc.) that can be tied to outcomes.
- Capture time spent providing service, either individually (case management) or to a group of participants (attendance). In ETO language, efforts are recorded into TouchPoints.



TouchPoints

3 steps to creating new TouchPoints.

1. Create the TouchPoint
2. Create the data elements
3. Set the security



TouchPoints

Step 1: Create the TouchPoint

Site Administration > Manage Touchpoints > New TouchPoint Button

The screenshot shows a web interface titled "Manage TouchPoints". At the top, there is a green header bar with the title. Below the header, there are two buttons: "New TouchPoint" (with a dashed border) and "Reporting Status". Below the buttons is a table with two columns: "Name" and "Subject Type". Each column has a text input field and a small grey button with a downward-pointing triangle (dropdown arrow) to its right.

Name	Subject Type
<input type="text"/>	<input type="text"/>

TouchPoints

Step 1: Create the TouchPoint

TouchPoint Wizard Cancel Save

TouchPoint Name*

Tags

Separate each tag with a space: outcome service effort. Or, to join two words together in one tag, use double quotes: "participant outcome".

Identifier

- Use current program name as Identifier
- Automatically generate Identifier
 - Use the same Identifier when pre-populating with previously recorded data
- Allow user to create Identifier
 - Require Identifier
- None

Section Quick Links

- Enable section quick links on each page

Question Numbering

- Use question numbering for each element

Update Period

- Limit the update period to days after the user specified date taken field (this is the date the user enters at the top of the record TouchPoint screen)
- Limit the update period to days after the date specified in

The lowest role allowed to override the update period restrictions is

When the response is locked display

Advanced Date Formatting

- Restrict date taken to days in the future from the actual (audit) date when recording
- Restrict date taken to days in the past from the actual (audit) date when recording
- Don't allow the date to be outside of a program enrollment when recording

Date Taken Blank by Default ?

- Make the date taken field blank by default

Record TouchPoint for/as Another Staff Account

- Allow a user completing this TouchPoint to select another user to receive credit (both users will receive credit)

Save as Draft

- Allow a user to save as Draft when recording the TouchPoint

Save Progress

- Allow a user to save their progress and continue recording the TouchPoint

Save and Record Similar

- Allow a user to save and record the same TouchPoint

Reporting ?

- Disable Aggregation and Sequencing of response data for all elements.

Allow Fund and Asset Disbursement ?

- Provide user with both the option to "Save" and "Save and Disburse Asset"
- Provide user with only the option to "Save and Disburse Asset"
- No Fund Disbursement



TouchPoints

Step 2: Add Data Elements from the Edit TouchPoint screen

Arrests

Edit TouchPoint Settings Question Settings Security Reporting Status Replicate Disable Preview Return to Manage TouchPoints


Name: Arrests
Tags: arrests indicators
Status: Enabled
Subject Type: Participant, Participant(M)

Show Disabled Questions
(0 Disabled Questions)

+ Add Page

First Page Edit Copy Delete

+ Add Question



TouchPoints

Step 2: Add Data Elements

TouchPoint Wizard: Select an Element to Add to KM Workshop Attendance

Select element type*:

<input type="radio"/> Section Header	<input type="radio"/> Time Spent	<input type="radio"/> Entity Cross Reference
<input type="radio"/> Message/Instructions	<input type="radio"/> Attendance	<input type="radio"/> Entity Cross Reference Attribute
<input type="radio"/> Yes/No	<input type="radio"/> Address Field	<input type="radio"/> Participant Cross Reference
<input type="radio"/> List	<input type="radio"/> Phone Number	<input type="radio"/> Demographics/Program Information
<input type="radio"/> Text	<input type="radio"/> National ID (SSN/SIN)	<input type="radio"/> Element Cross Reference
<input type="radio"/> Numeric	<input type="radio"/> Email	<input type="radio"/> Response Cross Reference
<input type="radio"/> Date of Next Contact	<input type="radio"/> Grid/Table	<input type="radio"/> User Cross Reference
<input type="radio"/> Page Break	<input type="radio"/> Signature	<input type="radio"/> ETO Check-In
<input type="radio"/> Date	<input type="radio"/> Electronic Signature	<input type="radio"/> Family Cross Reference
<input type="radio"/> Start/End Time	<input type="radio"/> File Attachment	<input type="radio"/> Question Bank Element




TouchPoints

Step 2: Directional Tracking of data

Track directional movement?

- No
- Yes - Tracking an increase
- Yes - Tracking a decrease

Use pseudonym


Capture one response for multiple subjects 

Require an answer to this question

Display tooltip

Should data recorded against this element be sequenced and aggregated over time? 

Question Placement Options

- Show question:
- Question and answer on separate lines:
- Place the following element on the next line:
- Indentation: 
- Show conditional rule highlighting:

Cancel

Save



TouchPoints

Step 2: Question Settings

- Reorder Fields
- Calculations
- Conditional Rules

Arrests

[Edit TouchPoint Settings](#) **Question Settings** **Security**

Name: Arrests
Tags: arrests indicators
Status: Enabled
Subject Type: Participant, Participant(M

- Calculations
- Conditional Rules
- Reorder Fields
- Multi-subject Level Responses
- Pre-populate answers
- Remember Last Value
- View Only
- View Screen Settings



TouchPoints

Step 3: Setting TouchPoint Security

2 Parts to TouchPoint Security:

- Assign a subject type to the TouchPoint
- Grant access to the TouchPoint



TouchPoints

Step 3: Setting Security

Edit TouchPoint > Security

Arrests

Edit TouchPoint Settings Question Settings ▼ **Security ▼** Reporting Status Replicate Disable Preview Return to Manage TouchPoints

Name: Arrests
Tags: arrests indicators
Status: Enabled
Subject Type: Participant, Participant(M)

- Add/View/Edit/Delete Own Responses
- View/Edit/Delete Others' Responses
- Share Responses Within Site
- Share Responses Across Enterprise
- Manage TouchPoint

Show Disabled Questions (0 Disabled Questions)



If you forget to set up touchpoint security or make a mistake in setting it up – users will be prevented from accessing the touchpoint!

LIMITATION





TouchPoints

Step 3: Assign a subject type to the TouchPoint

The screenshot shows the 'Security for Arrests' configuration page. At the top, there is a green header bar with the title 'Security for Arrests'. Below this, there are three tabs: 'Add/View/Edit/Delete Own Responses' (highlighted in green), 'View/Edit/Delete Others' Responses', and 'Share Responses Within'. Underneath these tabs, there are four sub-tabs: 'Add Responses' (highlighted in green), 'View Own Responses', 'Edit Own Responses', and 'Delete Own Responses'. A dropdown menu is open, showing a list of subject types: 'Participant' (highlighted in green and pointed to by a red arrow), 'Participant (multiple)', 'Entity', 'Entity (multiple)', 'Anonymous', and 'Family'. To the right of the dropdown, there is a 'Return' button and a note: 'Note: Changes will not be saved until you click'. Below the note, there is a text field with the value 'Participant' and a label 'Touch program that should be allowed to add responses.'. At the bottom of the page, there is a text field with the value 'Participant' and a label 'and programs'. At the very bottom, there is a text field with the value 'Participant' and a label 'Edit, Delete sub tabs' with a help icon.

TouchPoints

Step 3: Grant Access to the TouchPoint

Security for Arrests

Add/View/Edit/Delete Own Responses | View/Edit/Delete Others' Responses | Share Responses Within Site | Share Responses Across Enterprise | Manage

Add Responses | View Own Responses | Edit Own Responses | Delete Own Responses

Participant ▼ Return to Managing Arrests Save


Note: Changes will not be saved until you click "Save". Clicking the checkbox will not save the changes to security.

Select the user roles in each program that should be allowed to **add responses**.

Include disabled sites and programs

Apply settings to View, Edit, Delete sub tabs [?](#)

Site	Enterprise Manager	Site Manager	Department Head	Program Manager	Staff	Funders/Reports Only	Intake	Survey Taker	Entity Self Service
<input type="checkbox"/> Site: Admin									
<input type="checkbox"/> Site: Buckelew Programs									
<input type="checkbox"/> Site: COTS									
<input type="checkbox"/> Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ES - Recuperative Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ES MIC - Koffler Komer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> MHIP (Services)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Prevention & Diversion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sono - COTS, ES Family Shelter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sono - COTS, ES MIC - Singles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





If the TouchPoint will be used for more than one subject type. You must select each subject and assign permissions - one at a time.

LIMITATION





Check In

Write True or False in the chat in response to each statement.

- Touchpoints are automatically set up and available in ETO.
- You can format the text of a TouchPoint question to include **COLORS!**
- How you design a TouchPoint should depend on Best Practice & how you want to report on the data.
- Administrators have to choose who has permission to TouchPoints.





TouchPoints

Manage TouchPoints

Site Administration > Manage TouchPoints

- Admins can disable, delete, or edit the TouchPoint from the Manage TouchPoint page.

Manage TouchPoints			
<input type="button" value="New TouchPoint"/>	<input type="button" value="Reporting Status"/>	<input type="checkbox"/> Show Disabled TouchPoints	
Name	Subject Type	Tags	Take Action
<input type="text" value="Arrests"/> <input type="button" value="Filter"/>	<input type="text" value="Participant, Participant(M)"/> <input type="button" value="Filter"/>	<input type="text" value="arrests indicators"/> <input type="button" value="Filter"/>	<ul style="list-style-type: none"> Edit Calculations Conditions Security Disable Delete



TouchPoints

Question Bank Questions

Site Administration > Question Bank

- Use in multiple TouchPoints. When the question is updated in the Question Bank, it will update in all the forms.

Question Bank

New Question Show Disabled

Question	Question Type	Tags	Pseudonym	Enterprise Level	Take Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
A learning disability, development disability, or other impairment?	List		Kicked out for a learning or developmental disability?	✓	<p> Edit</p> <p> Copy</p> <p> Details</p> <p> Disable</p> <p> Delete</p>



***Do not change the HMIS
Template Touchpoints,
they are preset to fulfill
all requirements.***

LIMITATION





Check In

Write True or False in the chat in response to each statement.

- You can build TouchPoints using the TouchPoint Wizard under the Wizards feature on the navigation bar.
- Security in ETO is not passive, you have to actively choose who has permission to view/edit/record/etc. a TouchPoint.
- When building a TouchPoint meant to be taken for more than one participant at a time, select Participant as the subject type.
- Write an example of a tag you might use for several of your organization's TouchPoints.
- You have to select the Subject of each TouchPoint.





We Value Your Feedback!

To help us improve our training,
please complete the survey!

Welcome to Office Hours!

- Please use this time to

ASK QUESTIONS ABOUT FUNCTIONALITY

ASK TRAINER TO REDO A DEMO

ASK REAL-LIFE APPLICATION QUESTIONS

Thank you for joining us!

CONTACT US ANYTIME AT SUPPORT@SOCIALSOLUTIONS.COM OR LOGIN TO THE HELP CENTER!